

QUALIFIED LOW-INCOME MEDICARE BENEFICIARY (QMB), SPECIFIED LOW-INCOME MEDICARE BENEFICIARY (SLMB), AND QUALIFYING INDIVIDUALS (QI) APPLICATION

Name		Social security number		Medicare number		Date	
Telephone number ()		Date of birth		Sex <input type="checkbox"/> Male <input type="checkbox"/> Female		Marital status <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Single <input type="checkbox"/> Widowed	
Address (number, street)				City		State	
						ZIP code	

This information is to help you apply for the Qualified Medicare Beneficiary (QMB), Specified Low-Income Medicare Beneficiary (SLMB), or the Qualifying Individual-1 or Qualifying Individual-2 (QI-1 or QI-2) programs. The State will pay Medicare Parts A and B premiums, deductibles, and coinsurance fees for persons eligible for the QMB program. The State will pay Medicare Part B premiums for persons eligible for SLMB or QI-1. Persons eligible for the QI-2 program will be reimbursed a portion of the monthly Part B premiums that they have paid, to be refunded to them in the following year. You may apply for QMB, SLMB, QI-1, or QI-2 by completing and mailing this form to your local county social services agency.

To be eligible for QMB, SLMB, QI-1, or QI-2, you must:

- Be eligible for Medicare Part A (hospital insurance).
- Be eligible for Medicare Part B (medical insurance).
- Meet the following income requirements:
 - **QMB:** Net countable income at or below 100% of the Federal Poverty Level (FPL) (at or below \$759* for a single person, or \$1,015* for a couple).
 - **SLMB:** Net countable income below 120% of the FPL (below \$906* for a single person, or \$1,214* for a couple).
 - **QI-1:** Net countable income below 135% of the FPL (below \$1,017* for a single person, or \$1,364* for a couple).
 - **QI-2:** Net countable income below 175% of the FPL (below \$1,313* for a single person, or \$1,762* for a couple).
- * If you have a child living in the home with you, these amounts may be higher. These amounts are expected to increase each year in April. If you received a Title II Social Security cost of living adjustment in January, this amount will not be counted until April.
- Have no more than \$4,000 in nonexempt property for a single person, or \$6,000 for a couple.
- Meet certain requirements and conditions, such as being a resident of California.

IMPORTANT:

You may be eligible for other Medi-Cal programs in addition to the QMB and SLMB programs, such as food stamps and/or Medi-Cal with a monthly spenddown (share-of-cost). You may also be eligible for Medi-Cal with a monthly share-of-cost if you are **over** the income limits of the QMB, SLMB, QI-1, and QI-2 programs. This coverage would include payment of the Medicare Part B premium. If you wish to apply for these other programs, check yes and the county will send you other forms to complete.

☐ Yes ☐ No

Do you wish to apply for three months of retroactive coverage for the SLMB, QI-1, and QI-2 programs (there is no retroactive coverage for QMB).

☐ Yes ☐ No

List all persons living in your household (spouse/children). If you have more than three persons living with you, you may list them on a separate page.

Name	Social Security Number	Sex M=Male F=Female	Date of Birth	Relationship to You

**MAIL COMPLETED FORM TO YOUR COUNTY SOCIAL SERVICES AGENCY.
(ADDRESSES ON BACK SIDE OF THIS FORM)**

A. COUNTABLE INCOME

1. Fill in the MONTHLY unearned income received by the QMB/SLMB/QI-1/QI-2 applicant:

- a. Social security check \$ _____
- b. VA benefits \$ _____
- c. Interest from bank accounts or certificate(s) of deposit \$ _____
- d. Retirement income \$ _____
- e. Any other unearned income \$ _____
- f. Total UNEARNED INCOME—add lines a. through e. \$ _____

2. If you are married and living with your SPOUSE, fill in the MONTHLY unearned income received by your spouse:

- g. Social security check \$ _____
- h. VA benefits \$ _____
- i. Interest from bank accounts or certificate(s) of deposit \$ _____
- j. Any other unearned income \$ _____
- k. Retirement income \$ _____
- l. Total SPOUSE'S UNEARNED INCOME—add lines g. through k. \$ _____

3. Fill in the MONTHLY earned income received by the QMB/SLMB/QI-1/QI-2 applicant and spouse:

- m. Gross earnings for the person who wants to be a QMB, SLMB, QI-1, or QI-2 \$ _____
- n. Gross earnings for the spouse \$ _____
- o. Total—add lines m. and n. \$ _____
- p. Subtract \$65 \$ _____
- q. Remainder \$ _____
- r. Divide by 2 \$ _____
- s. Total EARNED AND UNEARNED INCOME—add lines f., l., and r. \$ _____

4. Potential QMB, SLMB, QI-1, or QI-2 eligibles:

- ☐ You are potentially eligible as a QMB if your income is at or below 100% of the FPL (at \$759* for a single person, or at \$1,015* for a couple).
- ☐ You are potentially eligible as a SLMB if your income is below 120% of FPL (below \$906* for a single person, or below \$1,214* for a couple).
- ☐ You are potentially eligible as a QI-1 if your income is below 135% of FPL (below \$1,017* for a single person, or below \$1,364* for a couple).
- ☐ You are potentially eligible as a QI-2 if your income is below 175% of FPL (below \$1,313* for a single person, or below \$1,762* for a couple).

* If you have a child in the home, these amounts may be higher.

COUNTY USE

Applicant's unearned income (line f) \$ _____

Spouse's unearned income (line l) + _____

Any income deduction - _____

Net unearned income _____

Net earned income (line r) + _____

Total net income _____

MFBU size _____

Compare to QMB/SLMB/QI-1/QI-2 income limit.

If over income limit, is there a spouse and/or children in the home? Complete the MC 176-2 A QMB/SLMB/QI form.

B. PROPERTY

A QMB, SLMB, QI-1, or QI-2 who is not married or not living with his/her spouse may have countable property which is equal to or less than \$4,000. A QMB, SLMB, QI-1, or QI-2 who is married and living with his/her spouse must have countable property which is equal to or less than \$6,000.

The following are examples of countable property. **Important:** The home you and/or a spouse live in **does not** count. One car used for transportation **does not** count. If you apply at the county welfare department as a QMB, SLMB, QI-1, or QI-2, the county may treat the property listed on this form differently. There are other types of property which the county welfare department, will also look at, i.e., certificates of deposit. This other property **may** or **may not** count towards the property limit.

Fill in the value of the following property which belongs to you, your spouse, or both of you.

- | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| 1. Checking accounts | \$ _____ |
| 2. Savings accounts | \$ _____ |
| 3. Certificate(s) of deposit | \$ _____ |
| 4. Stocks | \$ _____ |
| 5. Bonds | \$ _____ |
| 6. A second car (value minus amount owed) | \$ _____ |
| 7. A second home (value minus amount owed) | \$ _____ |
| 8. The cash surrender value of life insurance policies if the face value of all policies combined exceeds \$1,500 (Do not include "term" insurance policies) | \$ _____ |
| 9. Total PROPERTY—add lines 1 through 8 | **\$ _____ |

** This total cannot exceed \$4,000 for a single person or \$6,000 for a couple.

COUNTY USE

Additional information: You may be eligible for **up to three months of retroactive coverage** of your Medicare Part B premiums under the SLMB and QI programs.

NOTE: Individuals enrolled in traditional Medi-Cal, in addition to the QMB/SLMB/QI programs, may be subject to Estate Recovery. Medi-Cal benefits received by an individual after age 55 may be recoverable by the State. Recovery may be made from the estate or the distributee/heir of the Medi-Cal beneficiary if the beneficiary does not leave a surviving spouse, minor children, or a totally disabled or blind son or daughter. **Individuals enrolled in only the QMB/SLMB/QI programs, however, are not subject to Estate Recovery.**

I declare under penalty of perjury, under the laws of the United States of America and the State of California, that information I have given on this form is true, correct, and complete.

Signature (or mark) of applicant

Date



COUNTY USE

☐ QMB approved ☐ SLMB approved ☐ QI-1 approved ☐ QI-2 approved ☐ QMB/SLMB/QI-1/QI-2 denied

Eligibility Worker's signature

Date



Privacy Statement

Sections 14011 and 14012 of the Welfare and Institutions Code allow county welfare departments to get certain facts from you to decide if you, or the persons you represent, can get Medi-Cal benefits. You must provide these facts to get all or some of your Medicare Part B premiums paid by Medi-Cal. Failure to provide necessary facts can result in Medi-Cal benefits being denied.

The information will be used:

1. By the county welfare department to establish first-time and ongoing Medi-Cal eligibility.
2. By Electronic Data Systems (EDS) to process claims and make Benefits Identification Cards (BICs) for Medi-Cal benefits.
3. By the United States (U.S.) Department of Health and Human Services to make audit and quality control reviews and verify Medicare Buy-In and social security numbers (SSNs).
4. To verify alien status with the U.S. Immigration and Naturalization Service (INS) only for aliens who claim to be lawfully admitted for permanent residence or permanently residing in the U.S. under color of law (PRUCOL) or amnesty aliens with a valid and current I-688 card. The information the INS receives can only be used to determine Medi-Cal eligibility, and cannot be used for immigration enforcement unless you are committing fraud.
5. By medical services providers and health maintenance organizations to certify eligibility.
6. To identify health insurance coverage and take recovery actions.

The information you provide will be kept confidential. For more information or to access your records, contact your local county Social Services agency or the Social Security Administration.